



CONTRACT USER GUIDE



How to Use Statewide Contract PRF61, Management Consultants, Program Coordinators and Planners Services

Contract #: PRF61

Contract Duration: 01/01/2016 to 12/31/2019

MMARS #: PRF61*

Options to renew: Two options to renew up to one year each

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This contract contains Small Business Purchasing Program, Supplier Diversity Office (SDO) Businesses, Prompt Payment Discount Programs and Vendor Appraisal Management Form (VAMF)

Last updated: March 15, 2016

Contract Summary

Statewide Contract (SWC) PRF61 Management Consultants, Program Coordinators and Planners Services, provides a wide-ranging list of independent, experienced and pre-qualified vendors offering an array of management consulting services under multiple categories.

Eligible Entities that use this contract may purchase services through the development of a Statement of Work (SoW) and by establishing best value evaluation criteria, followed by the use of the Request for Quote process in COMMBUYS to obtain quotes from any of the pre-qualified vendors in the appropriate category of the contract.

List of Service Category(s):

- Education Services
- Program Development, Organizational and Strategic Planning Services
- Health and Human Services
- Professional Development Services (formerly Categories II, III & IV of PRF51 Training Services

Contract, now expired)

- General Data Analytics Services and Evaluation Services
- Environmental Consulting Services
- Revitalization Consulting Services

Benefits and Cost Savings

- Encourages a partnership between vendor and engaging entity for best value.
- Aggregating projects and volume can be established with vendor for common themes and best value.
- Summarizing department needs in a Statement of Work can effectively allow for prices to be negotiated based on an identified volume not known during the State bid process.
- Many SDP Plans are inclusive of subcontractors qualified to support a department for services under this contract and also allows for a department to meet their SDP annual benchmarks.
- Vendors have clients who are small and large and have a local and national presence.
- Pre-qualified vendors' business profiles are available for purchasing entities to review.
- Contract documents are located in one central location in COMMBUYS.
- Vendor Appraisal Management Form (VAMF) allows users of the contract to appraise vendors' performance on specific projects.

Who Can Use This Contract?

Applicable Procurement Law: MGL c. 7, § 22; c. 30, § 51, § 52; 801 CMR 21.00

Eligible Entities:

01. Cities, towns, districts, counties and other political subdivisions;
02. Executive, Legislative and Judicial Branches, including all Departments and elected offices therein;
03. Independent public authorities, commissions and quasi-public agencies;
04. Local public libraries, public school districts and charter schools;
05. Public Hospitals, owned by the Commonwealth;
06. Public institutions of high education;
07. Public purchasing cooperatives;
08. Non-profit, UFR-certified organizations that are doing business with the Commonwealth;
09. Other states and territories with no prior approval by the State Purchasing Agent required; and
10. Other entities when designated in writing by the State Purchasing Agent.

Services Available

Not Limited To:

EDUCATION SERVICES

Pre-qualified vendors under the Education Services Category offer education related Management Consulting Services to aid in the Commonwealth's commitment to provide a rigorous, comprehensive and successful education system.

Areas in which education services trainers and consultants are sought include, but are not limited to:

- Research based strategies
- Standards and accountability
- Assessment
- Professional development
- Innovation
- Student supports

PROGRAM DEVELOPMENT, ORGANIZATIONAL AND STRATEGIC PLANNING SERVICES

Pre-qualified vendors under the Program Development, Organizational Development, and Strategic Planning Category offer a broad range of services which the Commonwealth will draw on an “as needed” basis to meet the needs of the various departments and Eligible Entities.

Types of services acquired under this category may include, but are not limited to:

- Administrative.
- Human resource.
- Personnel.
- Physical distribution management
- Scientific administration
- Education
- Labor
- Health and Social Services
- Economic forecasting
- Budget analysis
- Market analysis
- Development of funding formulas
- Total cost analysis
- Projections in business development

HEALTH AND HUMAN SERVICES

Pre-qualified vendors under the Health and Human Services Category offer an array of services on an “as needed” basis. Such services include integrated human services that aid communities, families and individuals in a faster and cost-effective way to promote self-sufficiency. Direct services to clients are not covered through this contract.

The following list includes the fields in the health and human services spectrum:

- Public Health Services
- Mental Health Services
- Developmental Services
- Employment Services
- Child Service organizations
- Emergency Preparedness
- Financial Services

PROFESSIONAL DEVELOPMENT SERVICES: Pre-qualified vendors under the Professional Development Services Category offer a broad range of effective quality courses, from which Eligible Entities will use on an “as needed” basis to design and/or provide trainings/presentations/facilitations/ instructional design including e-learning on different topics that will increase the knowledge, understanding, and skill levels of Commonwealth of Massachusetts staff and/or the public it serves.

Areas in which professional development and training expertise are sought include but are not limited to:

- Leadership Development Programs
- Team building/ Capacity Building Programs
- Coaching Programs
- Train the Trainer(s) Programs
- Change Management Programs
- Communication Skills Programs
- Customer Relationship Management Programs
- General Health, Wellness & Safety Programs not requiring services of a hospital or university
- Business Process Redesign Programs

GENERAL DATA ANALYTICS SERVICES AND EVALUATION SERVICES: Pre-qualified vendors under the General Data Analytics Service and Evaluation Services Category offer technical assistance and expertise to generate the statistics needed to complete the requirements of projects per the scope of work established by the Hiring Entity, to inform the legislature and the public of emerging and existing concerns, to tailor new intervention and prevention programs as well as evaluate currently existing programs, and to generate knowledge to further improve on established services and/or programs.

Primary areas of research expertise that will be purchased through this contract include:

- Survey research, including data collection, analysis and development of needs assessment
- Linkage of large datasets
- Program evaluation, including design, analysis and report preparation
- Forecasting analytic techniques
- Small area and small domain estimation
- Complex survey sample design
- Qualitative analysis and mixed method of analysis
- Preparing and analyzing large data, comparative and cost effective studies
- Preparing and using electronic data for quality improvement work, service utilization, comparative effectiveness
- Expertise in geo-spatial analysis
- Subject matter expertise in economics, education, engineering, health and social services, transportation, financial services, the environment, cost effectiveness analysis, comparative effectiveness analysis, quality improvement work, policy analysis, secondary data analysis, and ecological studies design
- Quantitative data extraction and data management

ENVIRONMENTAL CONSULTING SERVICES: Pre-qualified vendors under the Environmental Consulting Services Category offer education, outreach, technical and environmental services to the Commonwealth and its Eligible Entities. The Environmental Consulting Services Category under this contract shall include, but not be limited to:

- Implementation of programs
- Research
- Risk assessment
- Environmental engineering services
- Data analysis and evaluation
- Technical support
- Policy analysis
- Impact analysis
- Planning
- Sustainable systems
- Green purchasing support
- Project coordination
- Sound surveys
- Environmental sampling/ measurement and modeling

REVITALIZATION CONSULTING SERVICES: Pre-qualified vendors under the Revitalization Consulting Services Category offer technical assistance consultant services related to City or Town Center development.

Primary areas of service include but are not limited to:

- Planning and Facilitation Services
- Economic Development Planning
- Business Recruitment and Business Retention
- Second Story Development
- Housing and Planning Services
- Technical Services
- Market Assessment Services
- Organizational Development of a Non-Profit
- Transportation Consulting Services
- Architectural Services
- Business Improvement Districts
- Technical Assistance Related to Downtown Revitalization

Pricing and Purchase Options (All Categories)

Purchase Options: Purchases made through this contract will be direct outright purchases. All elements of the project's creation through the use of Commonwealth funds are owned by the Commonwealth except where prior ownership has been established. Commonwealth departments should be made aware of such exceptions.

Multiple Quotes Requirement:

Engagements valued at less than \$10,000 require at least one quote or an accepted Statement of Work with an estimated value. However, if the engagement value is estimated to exceed \$10,000, the Commonwealth and its Eligible Entities must solicit at least three written quotes against the appropriate PRF61 Master Blanket Purchase Order (s) in COMMBUYS.

Eligible Entities must develop a written Statement of Work and attach it to the COMMBUYS RFQ. The engagement/ project will be awarded to the vendor deemed most responsive to the Statement of Work as evaluated by the awarding authority.

For projects with an estimated total price that is less than \$10,000, the Commonwealth and its Eligible Entities must ensure a sound business practice and award the contract to the responsible PRF 61 pre-qualified vendor that meets the project specifications outlined in the Statement of Work (SoW). Any work awarded under this method may not subsequently add tasks that exceed the \$10,000 threshold.

It is considered best practice to seek at least three quotes for all engagements; however, multiple quotes for engagements under \$10,000 are not required to ensure price is appropriate. Quotes must be obtained for all engagements that exceed \$10,000.

Compensation Structure/Pricing & Expenses:

- Compensation Structure/Pricing The compensation structure for the PRF61 contract is according to individual projects as described and agreed to in the SoW and the accepted bidder response. Awarded vendors are required to provide specific and transparent prices in all responses to bid quotation requests.

- *Project Pricing:* Costs under PRF61 must be determined through project-based compensation. Eligible Entities will determine the format in which quotations for their specific project will be collected. Vendors are expected to be competitive with each project and must provide a detailed and transparent budget related to the scope of services to be completed. Eligible Entities and awarded PRF61 vendors may negotiate project rates as part of the quote process. Negotiated project rates may be published by the Eligible Entities as part of the records in COMMBUYS.

- *Hourly Rates:* Engagements that are limited in scope, time and value might be best quoted on hourly rate compensation structure.

Invoicing: All bills/invoices must minimally include:

- Assignment name.
- Hours billed/invoiced and Statewide Contract hourly rate or portion of project billed:
 - *Hourly rate:* Identify account manager or other vendor agent and applicable hourly rate.
 - *Project based:* Identify portion of project billed and balance remaining, but not an average rate.
- Supporting documents must accompany billing/invoicing received by an engaging entity.
- Totals should be reviewed for correctness by engaging entity prior to approval.
- Total billed/invoiced must meet the Commonwealth's requirements if audited.

Sample Statement of Work (SoW): Eligible Entities must determine which of the two provided sample SoW best fit their needs for PRF61 engagements. Sample SoW can be found in the attachment tab of PRF61 PRF61 Bid/Contract Docs: RFR, Contract User Guide, Sample SOW, Vendor Appraisal Form, etc. COMMBUYS MBPO Number: PO-16-1080-OSD03-SRC3-00000006492.

- **Sample 1:** Recommended for engagement (s) related to technology or confidential data. Eligible Entities should consult with their legal team prior to using this SoW. Sections specific to technology are highlighted in yellow.
- **Sample 2:** Recommended for simple transactions.

Vendor Appraisal Management Form (VAMF)

In order to maintain their status as an active vendor under this contract, PRF61 pre-qualified vendors will be subject to user evaluation through an established Vendor Appraisal Management tool for each engagement. Eligible Entities will assess the awarded vendor's quality of performance and rate it against Key Performance Indicators. The following are the established criteria for VAMF:

- Quality & Competency
- Compensation Structure
- Delivery of Services
- Buyer Satisfaction/Customer Commitment

PRF61 vendors are subject to at least one user evaluation per project. The SSST will review completed vendor VAMFs periodic basis in order to make a determination as to whether or not a particular vendor will maintain its active status under this contract.

How to Purchase From PRF61 Solicitation Enabled MBPOs through COMMBUYS

Once Logged into COMMBUYS, select **DOCUMENTS > REQUISITIONS > NEW**

- **General Tab**
 - In the drop-down menu for **Requisition Type**, be sure to select "Release."
 - On the right hand side, select solicitation enabled.
- **Items Tab-** This Tab will allow you to search and add items from any of the seven PRF61 MBPOs; however, items can only be selected from a single MBPO at a time per requisition. Please follow the instructions and see below for a list of all seven MBPOs.
 - Select **Search Items** and click the + to open **Advance Search** fields.
 - Type "PRF61" into the **Description** field and Find It.
 - Review the **Item Description** to identify the correct PRF61 MBPO category and area of expertise.
 - Select and add **Quantity** for the category and service area of expertise. Please Note that items can only be selected from one MBPO at a time per requisition.
 - Click **Add to Req. & Exit**.
 - For each line item added to the Requisition you will need to add the estimated Project or Hourly Catalog Price/Unit Cost. To do so, click **Enter Info**.
 - Select vendors to quote under the **Distributors Tab**.
 - Please follow the quote requirements when selecting vendors under the vendor sub tab.
- **Address Tab**

- Enter the Bill To and Ship To address for the Purchasing Entity.
- **In the Attachment Tab**, you will need to attach the following:
 - Statement of Work.
 - Any other bid document (s) at your discretion.
- **Summary Tab**
 - Review your Solicitation Enabled Release Requisition.
 - Send for Approval.

Distributor Model Master Blanket Purchase Orders (MBPOs)

Refer to www.COMMBUYS.com

- Click on “Advanced Search” to search by “Document Type.”
- Select “Contract/ Blankets.”
- Type in “PRF61” in the “Contract/ Blankets Description” search field to find the distributor model Master Blanket Purchase Orders (MBPOs) for MBPOs listed below:

PO-16-1080-OSD03-SRC3-00000006492	PRF61 Bid/Contract Docs: RFR, Contract User Guide, Sample SOW etc.
PO-16-1080-OSD03-SRC3-00000006493	PRF61 Program Development, Organizational and Strategic Planning Services Category
PO-16-1080-OSD03-SRC3-00000006494	PRF61 Health and Human Services Category
PO-16-1080-OSD03-SRC3-00000006495	PRF61 General Data Analytics Services and Evaluation Services
PO-16-1080-OSD03-SRC3-00000006496	PRF61 Revitalization Services Category
PO-16-1080-OSD03-SRC3-00000006497	PRF61 Professional Development Category
PO-16-1080-OSD03-SRC3-00000006498	PRF61 Education Services Category
PO-16-1080-OSD03-SRC3-00000006499	PRF61 Environmental Services Category

Strategic Sourcing Team Members

Joe Burch	DPH	Joe.Burch@state.ma.us
Charles Caron,	DPH	Charles.Caron@state.ma.us
Tammy Goodhue	DPH	Tammy.Goodhue@state.ma.us
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Kristen Heffernan	DPH	Kristen.Heffernan@state.ma.us
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Mark Southard	DHCD	Mark.Southard@state.ma.us
Sorraia Tavares	OSD	Sorraia.Tavares@state.ma.us
Julia Wolfe	OSD	Julia.Wolfe@state.ma.us

Vendors Contact Information

- Refer to www.COMMBUYS.com
 - Click on “Advanced Search” to search by “ Document Type”
 - Select “Contract/ Blankets,”
 - Type in “PRF61” in the “Contract/ Blankets Description” search field to all Master Blanket Purchase Orders (MBPOs) for the Awarded Vendors.
 - **63 out of the 75 Awarded PRF61 vendors are listed below. This list will be updated to include contact information for all 75 vendors.**

Vendor Name	Contract Manager	Email Address	Phone
Abt Associates	Julie Porcelli	julie_porcelli@abtassoc.com	301-347-5573
Accenture, LLC	Timothy Rogers	timothy.p.rogers@accenture.com	781-962-3525
Ann McFarland Burke	Ann McFarland Burke	a.burke@westernmassedc.com	413-575-5345
ATC Group Services dba Cardno ATC	Michael Gitten	michael.gitten@cardno.com	781-404-1439
Bailit Health Purchasing, LLC	Michael Bailit	mbailit@bailit-health.com	781-453-1166
Blue Sage Consulting, Inc.	Pamela Campagna	pamelac@bluesageconsulting.com	508-735-6831
Casey Hall Training Associates	Michael W. Gillen	mwgillen@comcast.net	617-821-1612
Center for EcoTechnology, Inc.	John Majercak	John.Majercak@cetonline.org	413-586-7350 x228
Center for the Support of Families, Inc.	Vernon Drew	vdrew@csfmail.org	301-587-9622
Christine D. Moynihan dba Retail Visioning	Christine D. Moynihan	Chris@RetailVisioning.com	508-660-6230
Community Training and Assistance Center	Jeffrey E. Edmison	jedmison@ctacusa.com	617-423-1444

Vendor Name	Contract Manager	Email Address	Phone
Crisis Management Group dba CMG Associates	Bruce Cedar	bcedar@cmgassociates.com	617-803-4518
Deloitte Consulting	Susan McConathy	smcconathy@deloitte.com	617-437-3534
Deltawrx	Brian Hudson	BHUDSON@DELTAWRX.COM	818-227-9300
DMA Health Strategies	Richard H. Dougherty	dickd@dmahealth.com	781-863-8003
Eastern Research Group	John Wilhemi	john.wilhemi@erg.com	781-674-7312
Edgmere Consulting Corp.	John Washek	jwashek@edgemereconsulting.com	781-581-9991
Environmental Health & Engineering	Leo Ryan	lryan@eheinc.com	617-620-4566
Environmental Strategies & MGT	Douglas Heely	dheely@esm-inc.com	508-226-1800
Ernst & Young U.S. LLP	Debra Cammer Hines	debracammer.hines@ey.com	617-585-1981
Favermann Design	Mark Favermann	favermann@gmail.com	617-247-1440
Finepoint Associates	Peg Barringer	Peg@FinePointAssociates.com	617-763-5952
Geosight, Inc.	Michael J. Webster	mjwebster@geoinc.com	978-679-1600
Gopi Bala, LLC	Gopinath Balasubramanian	gbala@gopibala.net	617-921-0100
Hagerty Consulting, Inc.	Katie Freeman	Katie.freeman@hagertyconsulting.com	847-492-8454 x119
Harriman Associates	Steven G. Cecil	scecil@cecilgroup.com	617-426-5050
Health Resources in Action (HRiA)	Jodie Silverman	jsilverman@hria.org	617-451-0049
HRP Associates, Inc.	Jeffrey R. Sotek	jeff.sotek@hrpassociates.com	508-407-0009
HWK Consulting, LLC	Hope Wordan Kenefick	hopewk@comcast.net	603-664-9920
ICF Incorporated, LLC	Kevin Palaia	kevin.palaia@icfi.com	617-250-4271
Industrial Economics Corp.	Angela J. Helman	ahelman@indecon.com	617-354-0074

Vendor Name	Contract Manager	Email Address	Phone
JSI Research & Training Institute	Lori Kiel	Lori_Kiel@jsi.com	617-482-9485
Justice Resource Institute, Inc.	Richard Lieberman	rlieberman@jri.org	781-559-4900 x3310
KPMG, LLP	Manolet G. Dayrit	mdayrit@kpmg.com	212-872-3854
Lightship Engineering, LLC	Timothy Condon	tcondon@LightshipEngineering.com	508-830-3344 x120
Lynn Rose	Lynn Rose	lynnfaith@comcast.net	413-522-5525
M + R Strategic Services	Lori Fresina	lfresina@mrss.com	617-686-3625
Mass Insight Education	Michael Contompasis	mpartridge@massinsight.org	617-778-1538
Mathematica Policy Research, Inc.	Pamela L. Tapscott	rpfcenter@mathematica-mpr.com	202-484-3294
McKinsey & Company, Inc.	Nick Leach	nick_leach@mckinsey.com	202-662-3338
Metaview Consulting & Coaching	Steve Frigand	sfrigand@metaviewcc.com	781-646-7180
MGT of America, Inc.	Fred Seamon	FSeamon@mgtamer.com	850-386-3191
Morgan, Brown & Joy, LLP	Jaclyn L. Kugell	jkugell@morganbrown.com	617-788-5054
Navigant Consulting, Inc.	Catherine Sreckovich	csreckovich@navigant.com	312-583-5747
Navin Associates	Paul Christopher Navin	navinassociates@comcast.net	617-698-5176
Nelson/Nygaard	Paul A. Jewel	pjewel@nelsonnygaard.com	415-284-1544
Next Street	Cynthia Lacasse	clacasse@nextstreet.com	617-318-6531
North Passage Associates	Russ Meekins	russmeekins@northpassageassociates.com	617-285-5489
Northeast Recycling Council	Lynn Rubinstein	lynn@nerc.org	802-254-3636
Partners for a Healthier Community	Kathleen Szegda	kszegda@partnersforahealthiercommunity.com	413-794-1803
Peeler Associates	Marie Peeler	MPeeler@PeelerAssociates.com	781-294-9203

Vendor Name	Contract Manager	Email Address	Phone
Polus Center for Social and Economic Development, Inc.	Laure Close	lclose@poluscenter.org	978-368-1550 x4
Pricewaterhouse Coopers Public Sector, LLP	Nini Donovan	nini.donovan@pwc.com	617-530-5547
Public Consulting Group, Inc.	Stephen Skinner	sskinner@pcgus.com	617-426-2026
Public Financial Management	John Cape	capej@pfm.com	215-567-6100 x1221
Public Safety Strategies Group, LLC	Kym Craven	kcraven@publicsafetystrategies.com	978-314-7283
Regina Villa Associates, Inc.	Nancy Farrell	nfarrell@reginavilla.com	617-357-5772 x11
RKG Associates, Inc.	Craig Seymour	crs@rkassociates.com	603-953-0202
Self Esteem Boston	Jeri Levitt	empowermail@selfesteemboston.com	617-983-1111
Skillsoft Corporation	Brendan Joseph	Brendan_Joseph@skillsoft.com	603-966-0790
Strategic Solutions Group, LLC	John Schaeffer	jschaeffer@ssg-llc.com	617-721-8845
Strategy Matters, LLC	Liz O'Connor	liz@strategymatters.org	617-733-2286
Syncom	Alan R. Williams	alan.williams@syncomconsulting.com	617-751-9101
TetraTech	Clint Osborn	clint.osborn@tetrattech.com	202-577-9414
The Fort Hill Companies	William F. Lyons, Jr.	wlyons@forthillcos.com	877-305-4163
The Mauch Group, LLC	Irene Mauch	Irene@mauchgroup.com	781-775-5251
The Ripples Group	Atila Habip	ahabip@ripplesgroup.com	617-513-2959
UMass Donahue Institute	Laura Eve-Cowles	leve-cowles@donahue.umassp.edu	413-545-0001
Vanasse Hangen Brustlin (VHB)	Peter C. Cusolito	pcusolito@vhb.com	617-607-0096
WalkBoston	Wendy Landman	wlandman@walkboston.org	617-367-9255
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Vendor Name	Contract Manager	Email Address	Phone
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Zelus Consulting Group	Jenny Graham	Jenny.Graham@zelusllc.com	617-821-1061